



Setup Guide

for

Country Characteristics

Release 4.0



How to set up CPA Country Characteristics.

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for Release 4.0**

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Introduction

About the Country Program

The Country program is used to set up information about individual countries for the system. Many of the countries that your firm will use in Cases and Names have already been set up. use this guide to help you make changes to various countries in the system.

A country can be a real country or an entity such as a group country e.g. Patent Cooperation Treaty (PCT).

















In Country you can:




- store general information about a country
- store details about the country's name and address formats
- store information about the country's Group relationships
- indicate valid statuses for members of Group Countries
- store information about holidays and the days of the working week
- store information about the trademark classification system in the country
- store information about a country's geographic states
- store information about the country's attributes, such as multi-class trademarks
- store information about default billing arrangements and addresses for clients in the country
- store the property types and details that are valid for the country
- maintain official number patterns.

Screen Layouts and Navigation

Buttons

Refer to the following table for the functions of buttons:

Button	Shortcut Keys	Purpose	How referred to in this document
	[Ctrl] [X]	Cut selected text from field	[Cut]
	[Ctrl] [C]	Copy selected text from the field	[Copy]
	[Ctrl] [V]	Paste copied or cut text into selected field	[Paste]
	[Alt] [Backspace]	Undo the most recent cut, copy or paste action	[Undo]
	[Ctrl] [L]	Clear all fields ready for a new entry to be added	[Clear All]
	[Ctrl] [A]	Add the selected entry to the database	[Add]
	[Ctrl] [U]	Update the selected entry	[Update]
	[Ctrl] [D]	Delete the selected entry	[Delete]
		Move to the first record	[First]
		Move to the previous record	[Previous]
		Move to the next record	[Next]
		Move to the last record	[last]
		Open the on-line help for assistance with using the program	[Help]
		Close the window and return to Launchpad	[Exit]
		Sort the records in the ascending sequence	[Ascending Sequence]
		Sort the records in the descending sequence	[Descending Sequence]

Button	Shortcut Keys	Purpose	How referred to in this document
		Search the records according to the entered criterion	[Search]
		Expand the field into a new window	[Expand]
	[Ctrl] [X]	Cut selected text from field	[Cut]

Tab Windows

Details

The Details tab is the first tab displayed when you access Country from the Launchpad and is where you select a country to view or maintain details.

Text

The Text tab allows you to add IP-specific information about the country. This text can be used in letters. Also, your firm may want to enter a definition of the marking requirements in the country, or a description of the period which will make a trademark liable to be removed from the register for non-use in each country. It can also function as reference information for staff members.

Groups

Use the Groups tab to maintain information about the country's group relationships, if they are members of group countries, such as the Paris Convention or Patent Cooperative Treaty.

Status Flags

The Status Flags tab is only active on “group” countries and is used to indicate the status that can be applied to members that group.

Holidays

Use the Holidays tab to maintain information about holidays and the working days of countries. This information entered here is used by the Control program to calculate due dates and when reminders are to be displayed for users.

Classes

Use the Classes tab to define the classes for cases are. A case can be classified on two levels:

- by local classes (according to the classification specific to the country of the Case)
- by international classes.

States

Use the States tab to maintain information about the geo-political subdivisions of a country where this is applicable. For example, Australia has a federal political system and is subdivided into a number of states.

Defaults

Use the Defaults tab to maintain information about the default billing arrangements for clients in a particular country and to specify the default method for automatically populating the City and Postcode fields for when new names are added via the Names program.

Valid Combinations

On the Valid Combinations tab, you can set up the permitted property types and details that may be used in the Cases program for the selected country. Only the combinations of descriptors specified on this tab are allowed.

Default combinations that apply to multiple countries can also be defined. It is also possible to copy the rules from one country to another.

Number Patterns

The Number Patterns tab lets you define official number formats for a country. Existing official numbers such as Application, Registration and Acceptance numbers and new numbers can be checked for accuracy as they entered via the Cases program. You set it up so that Cases will not accept non-conforming numbers.

Setting up Country Characteristics

Viewing and Maintaining Basic Country Details

The screenshot shows the 'Country Details' application window. It features a menu bar (File, Options, Report, Window, Help) and a toolbar with icons for search, save, and navigation. Below the toolbar is a tabbed interface with tabs for Details, Text, Groups, Status Flags, Holidays, Classes, States, Attributes, Defaults, Valid Combinations, and Number Patterns. The 'Details' tab is active, displaying a table of country data and several configuration panels.

Code	Country	Type	Abbreviation	Alt. Code	Commenced	Ceased	ISD Code
AF	Afghanistan	Address	AFGHAN.	AF	01-Jan-1900		+93
OA	African Intellectual Property Organ	Group	OAPI	OA	01-Jan-1900		
AP	African Regional Intellectual Propri	Group	ARIPO	AP	01-Jan-1900		

Below the table, there are several configuration panels:

- Search For:** A text field with a search icon and a 'Column:' dropdown set to 'Code'.
- Code:** AF, **Alternate:** AF, **Record Type:** ☒ Address, ☐ IP Only, ☐ Group.
- Abbrev.:** AFGHAN., **Country:** Afghanistan, **Postal Name:** Afghanistan, **Informal:** Afghanistan, **Adjective:** Afghanistan, **International Telephone Code:** +93.
- Date Commenced:** 01-Jan-1900, **Date Ceased:** (empty).
- Input Display:** **State Literal:** (empty), ☐ Format using abbreviation, **Post Code Literal:** Postcode, ☐ Code Before City?
- Output Display:** **Name Style:** Surname Last, **Address Style:** City before PostCode - No State.
- Notes:** A text area for additional information.

At the bottom, there is a status bar showing 'Country table.' and buttons for 'CAPS' and 'NUM'.

Locating a Country's Details

Either scroll or use the search function to locate the details of a country.

Scrolling

Scroll the list of countries by:

- using the vertical scroll bar
- using the [Previous] and [Next] toolbar buttons,
- using the [First] and [Last] buttons to move to either the first or last record in the list.

Searching

Countries can be searched on any of the columns.

To search for a country's details, complete the following fields on the Details tab:

- 1 Type the data to search for in the Search For field.
- 2 Select a column to search on from the Column drop down list.
- 3 Click [Search].

Checking the AutoSearch checkbox commences the search automatically.




i The search always starts from the country row that is highlighted in the table.


Sorting the Country List

The country list can be sorted on any column in either direction.

To change the sort order:

- 1 Select the column to sort on from the Column drop down list
- 2 Click a sort button.





Adding Basic Country Details

To add a new country and store its basic details:

- 1 On the Details tab, click the [Clear All].
- 2 Complete the following fields as required:



Field	Particulars
Code	Type the two-character WIPO code used to identify the country.
Alternate	Type your firm's alternate code for the country it has its own special set of country codes.
Record Type	Select a Record Type as required. <ul style="list-style-type: none"> • Address: the name of a real country that can be used in the address of correspondence • IP Only: it is not the name of a real country a geographic sense, but it is required for IP cases and matters (e.g. Benelux etc.); and is not used in an address for correspondence. • Group: similar to IP Only country, is a central IP Office representing a group of member countries on whose behalf it will act (e.g. Patent Cooperation Treaty) and never used for addressing correspondence.
Abbrev	Type a shortened version of the country name to be used in reports etc.

Setting up Country Characteristics

Field	Particulars
Country	Type the official WIPO name of the country.
Postal Name	Type the name of the country to be used in correspondence. It is not available for Group countries.
Informal	Type a brief or more descriptive version of the country name, e.g. Democratic People's Republic of Korea, Socialist Republic of Vietnam etc.
Adjective	Type the form of the country's name that is used as an adjective, e.g. Swiss, Irish, Chinese etc.
International Telephone Code	Type the ISO standard international telephone country code, e.g. +1 for USA, +61 for Australia etc. is +61).
Notes	Type any descriptive text or information about the country. For example, you could include old versions of the name; the form of the name used in the local language; or information about the creation, dissolution of the country or anything that to help you select the correct country for an address or when adding new cases.
Date Commenced	Type or select the date from which the country began. For example, when the country became independent or the date on which intellectual property laws commenced in the country.
Date Ceased	Type or select the date that the country ceased to exist or when intellectual property laws ceased to apply in the country.
State Literal	Type the correct terminology for the State field to be used in correspondence, e.g. State or Province etc. (This field does not display for IP Only and Group Record Types.)
Format Using Abbreviation	Check this box if addresses for correspondence should use abbreviated form of the state or province name. For example, if this box checked, the system will use ACR (a state of Brazil) instead of Acre (the full name). (This field does not display for IP Only and Group Record Types.)
Postcode Literal	Type the correct terminology for the postal code to be used in correspondence, e.g. Postcode, Zipcode etc. (This field does not display for IP Only and Group Record Types.)
Code Before City	Check this box if the address should be formatted with the postal code before the city name. (This field does not display for IP Only and Group Record Types.)
Name Style	Select from the drop-down list whether surnames should be first or last when used in correspondence. (This field does not display for IP Only and Group Record Types.)
Address Style	Select from the drop-down list the combinations for how the various components of an address display in correspondence. (This field does not display for IP Only and Group Record Types.)

- 3 Click [Add] when finished.

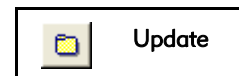


Modifying a Country Code

Use this procedure if the name or code of a country has changed and there is no need to keep the old code separate in the system. If you do need to keep the old code, see “Setting Up Additional Country Codes” on page 8).

To modify the code and name of a country:

- 1 On the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5).
- 2 Modify the following fields as required:
 - Code
 - Alternate
 - Abbrev
 - Country
 - Postal Name
 - Informal
 - Adjective
 - International Telephone Code
 - **Note:** Type a brief note to explain the name and code change.
- 3 Click [Update] when finished.



 The system will not accept a country code that already exists.

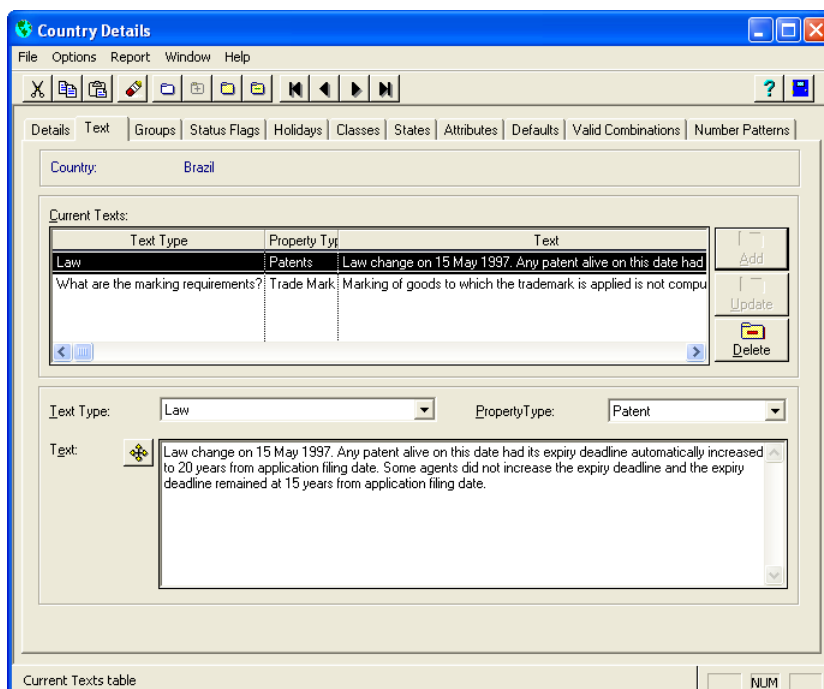
Setting Up Additional Country Codes

Use this procedure if you need to retain the code of country that no longer exists or set up codes for countries or regions not in the official list. You should only do this if there IP cases associated with them, for example, where two or more countries have merged into another country name.

To set an additional country code, create the code ensuring that it is unique. You could, for example, distinguish new codes from the WIPO Standard codes by creating three-character codes. Record that the country ceased to exist in the Date Ceased field to indicate that the old country is no longer being used. (See “Adding Basic Country Details” on page 6.)

Maintaining Text.

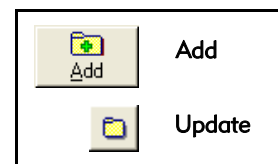
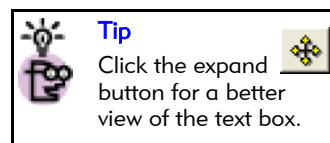
Text entered against a country record can be used in correspondence as well being a useful source of information for your firm about a particular country.



Adding Text to a Country Record

To add text to a country's record:

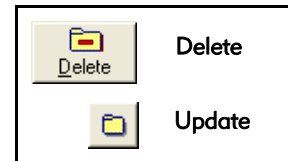
- 1 From the Details tab, locate the country in the list. (See "Locating a Country's Details" on page 5.)
- 2 Click the Text tab.
- 3 Complete the following fields on the Text tab:
 - **Text Type:** Select a text type from the drop-down list.
 - **Property Type:** Select the property type that this text type will apply to from the drop-down list.
 - **Text:** Type the text that is to be stored.
- 4 Click [Add].
The text moves to the Current Texts section of the screen.
- 5 Click [Update] to save the text.



Removing Text

To remove text from a country's record:

- 1 From the Details tab, locate the country in the list. (See "Locating a Country's Details" on page 5.)
- 2 Click the Text tab.
- 3 Click the text to delete in the Current Texts section of the screen.
- 4 Click [Delete].
A confirmation message box displays - click [Yes].
- 5 Click [Update] to save.

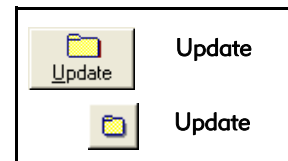


Editing Existing Text

You can change the text type, the property type or the actual text itself for any country.

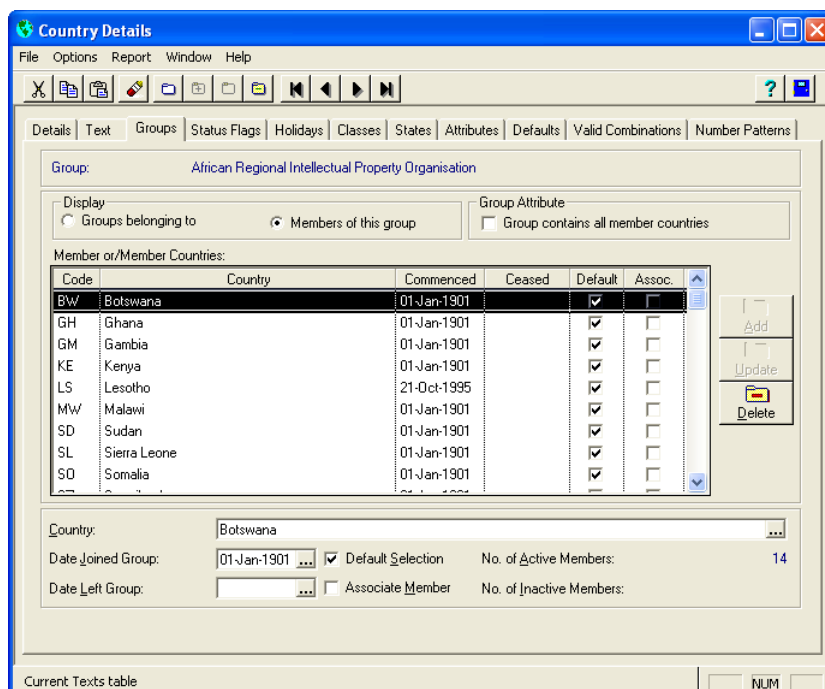
To edit existing text for country:

- 1 From the Details tab, locate the country in the list. (See "Locating a Country's Details" on page 5.)
- 2 Click the Text tab.
- 3 Edit the fields and the text as required and then click [Update] to the right of the Current Texts section.
- 4 Click [Update] on the toolbar to save.



Grouping Countries

Countries can be grouped according to the organisations that they are members of, e.g. Patent Cooperative Treaty (PCT).



On the Group tab, you can:

- view the countries that are members of a group
- view the groups that a country belongs to

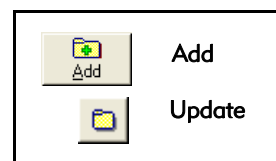
Setting up a New Group

For information on setting up a new group, see “Adding Basic Country Details” on page 6 and select Group as the Address Type.

Adding a Country to a Group

To add a country to a group:

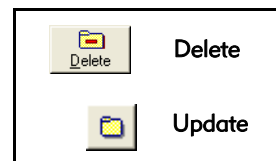
- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Groups tab.
- 3 Click the picklist button [...] for the Group field.
- 4 Click a group in the list to select it and then click [OK].
The Group field displays the group selected.
- 5 Complete the following fields on the Groups tab:
 - Date joined Group: Type or select the date that the country joined the group.
 - Default Selection: Check this box if this country should be selected when the entire group is selected.
 - Associate Member: Check this box if the country is not a full member.
- 6 Click [Add].
- 7 If there are more groups that you want to add this country to, then go back to Step 3; otherwise click [Update] on the toolbar to save.



Removing a Country from a Group

To add a country to a group:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Groups tab.
- 3 Click the Group in the list to select and then click [Delete].
- 4 Click [Update] on the toolbar to save.



Viewing the Countries in a Group

To view the countries in a group:

- 1 From the Details tab, locate the group in the list.
- 2 Click the Groups tab.
The countries that are members of the group are displayed.

Maintaining Status Flags

These flags are used to maintain the status of the progress of group cases within designated countries. For example, a PCT case may be due to enter the national phase. If the appropriate Status Flag is set up, then when the case enters the national phase, the person maintaining the case in CPA Inprotech or Workbenches can update the designated countries by selecting the checkboxes.

Country Flag	National Phase Allowed	Restrict Removal	Registration Status	Copy Profile
Select at Application	<input type="checkbox"/>	<input type="checkbox"/>	Pending	
Elect Preliminary Examination	<input type="checkbox"/>	<input type="checkbox"/>	Pending	
National Phase Entered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pending	PCT National Phase
Special Action Completed	<input type="checkbox"/>	<input type="checkbox"/>	Pending	
Abandoned	<input type="checkbox"/>	<input type="checkbox"/>	Pending	

i You can only add status flags to groups.

Adding a New Status Flag

To add a new status flag:

- 1 From the Details tab, locate the group in the list.
- 2 Click the Status Flags tab.

- 3 Complete the following fields on the Status Flag tab:

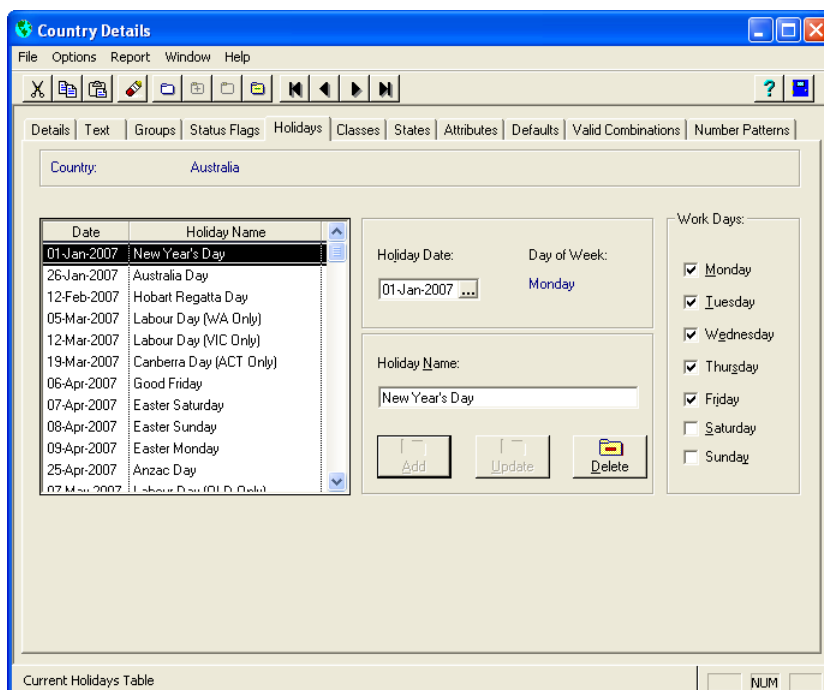
Field	Particulars
Flag name	Type the name of the stage in the progress of the case in a member country. Note: The relative sequence of these flags is important as Policing rules can be set up to consider the status. For example, a reminder to Elect Preliminary Examination would not be generated if the designated country had a status of National Phase Entered or Abandoned.
Allow Entry For National Phase	Check this box if your firm wants to have a separate case for a particular country of the group. If this checkbox is selected, a new Case for the country may be created with a Copy Profile.
Restrict Removal Of Designated Country	Check this box if the country is not to be removed from the list of selected countries for the case via the Designated Countries tab in Cases.
Create Cases Using Copy Profile	Select a Copy Profile to be automatically applied when a case created for this country has been updated by copying case details from a parent case.
Registration Status:	Select a status of a designation in PCT or group cases. The CPA Inprotech Electronic Interface uses this status to identify a valid country status.

- 4 Click [Add] to add the entered details in the table above the fields. Click [Update] to save the details.

Setting up National Holidays

On the Holidays tab you can set up public holidays and work days for the country. The Control program uses the information entered here to calculate due dates and when reminders are displayed and so on.

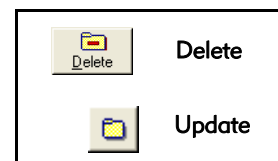
The work days are the days on which the Intellectual Property Office in that country is open for business.



Adding a New Public Holiday

To add a public holiday for a country:

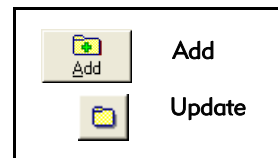
- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Holidays tab.
- 3 Complete the following fields on the Holidays tab:
- 4 Holiday Date: Type or select the date of the holiday.
- 5 Holiday Name: Type the name of the public holiday.
- 6 Click the Group in the list to select and then click [Delete].
- 7 Click [Update] on the toolbar to save.



Adding a New Public Holiday

To add a new public holiday for a country:

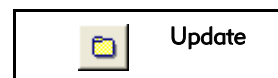
- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Holidays tab.
- 3 Complete the following fields on the Holidays tab:
 - Holiday Date: Type or select the date of the holiday.
 - Holiday Name: Type the name of the public holiday.
- 4 Click [Add]. If there more holidays to add, go back to Step 3, otherwise click [Update] on the toolbar to save.



Setting up Work Days for a Country

To set up the normal working days in a country:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Holidays tab.
- 3 Check the boxes the IPO is normally open for business in the country.
- 4 Click [Update] on the toolbar to save.



Maintaining Local and International Classes

Use the Classes tab to set up local and international classes for countries.

If your firm does not set up local classes for a country, then the classes from the Default Foreign Country (code ZZZ) are used instead.

Adding Classes for a Country

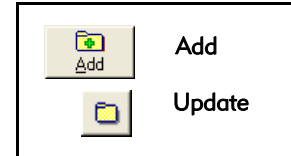
To add classes for a country:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Classes tab.
- 3 Complete the following fields on the Classes tab:

Field	Particulars
Property Type	Select the property type that new class will apply to.
Class	Type the class number or identifier.
Sub-Class	Type the sub-class associated with the class. Note: The sub-class field is available only when the Allow Sub-Class checkbox is selected on the Property Type Pick List window.

Field	Particulars
Effective Date	Type the date on which the class became effective.
Class Heading	Type the text to be copied from the Classes tab in Country on the Goods/Services tab in Cases.
Class Notes	Type any additional information or remarks about the classes associated with the country.

- 4 Click [Add] then [Update] on the toolbar when finished.



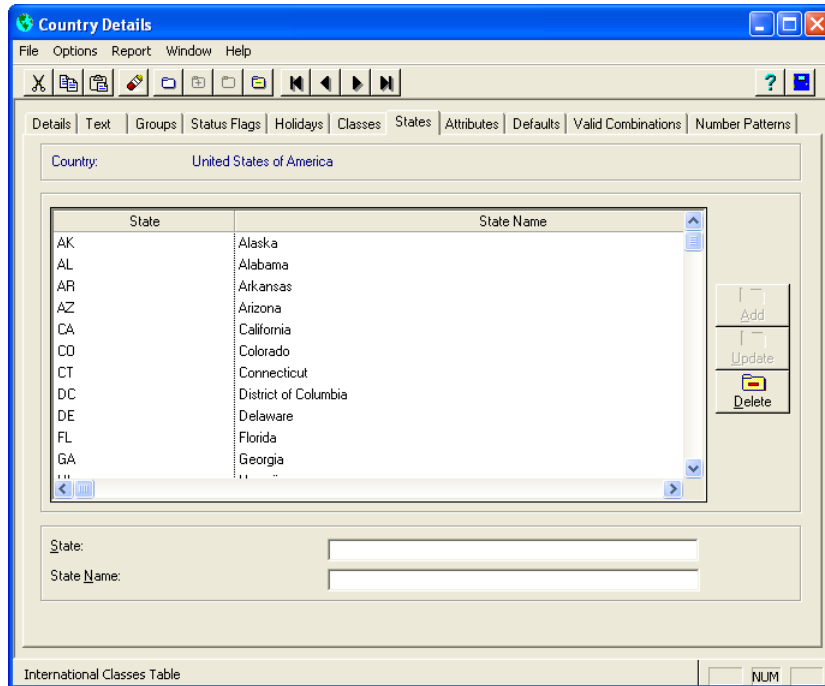
Translating Class Headings into Other Languages

To translate the Class Heading into another language:

- 1 With the Class selected in the list, right-click in the Class Heading field and select Data Translation.
The Data Translation Pick List displays.
- 2 Click [Maintain] and then complete the following fields:
 - Language: Select the language of the translation from the drop-down list.
 - Translation: Type the translation of the text in the selected language.
- 3 Click [Save].

Setting up States

If a country has states or provinces, these can be maintained on the States tab.

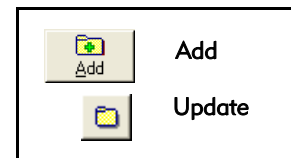


i The default label in the Country is State. You can change this on the Details tab in the State Literal field.

Adding a State or Province

To add a state or province to a country:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the States tab.
- 3 Complete the following fields on the States tab:
 - State: Type the abbreviated for of the state or province.
 - State Name: Type the full name of the state or prince.
- 4 Click [Add]. If there more states to add, go back to Step 3, otherwise click [Update] on the toolbar to save.

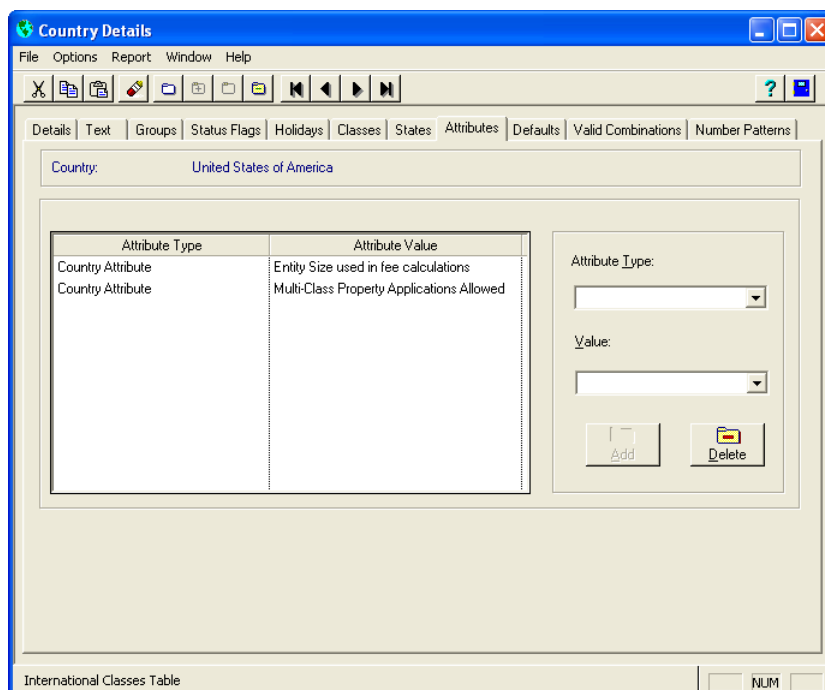


Setting up Attributes

On the Attributes tab, you can record a variety of miscellaneous information about a country.

Useful attributes to set up include:

- whether the country allows multi-class trademarks.
- whether the entity size is used in fee calculation attribute
- the languages used in the country
- and many more.



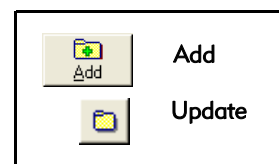
Adding an Attribute

Use this procedure to add attributes to a country. For examples of applying attributes, refer to “Country Attribute Examples” below.

To add an attribute to a country:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Attributes tab.

- 3 Complete the following fields on the States tab:
 - Select an Attribute Type from the drop-down list.
 - Select a Value from the drop-down list.
- 4 Click [Add]. If there more states to add, go back to Step 3, otherwise click [Update] on the toolbar to save.



Country Attribute Examples

Following are some examples of how to use the Country Attribute Type.

Allowing Multiple-Class Trademark Cases

The Multi-Class Property Applications Allowed attribute controls whether cases can be created for all classes. With this attribute set, users can create a single case in all classes. If it is not set, a case must be created for each class.

Allowing Multi-Class Applications at the National Phase

CPA Inprotech can set-up to handle circumstances, such as those in Singapore, where multi-class applications are not allowed. However, multi-class cases are allowed if they are lodged under the Madrid Protocol.

For example, a multi-class application is created in Australia, where it is allowed, and lodged under the Madrid Protocol with Singapore on the list of designated countries. When the time comes for it to enter the national phase in Singapore, the multi-class application can be filed with the intellectual property office even though Singapore normally does not allow multi-class applications.

Use the following procedures to:

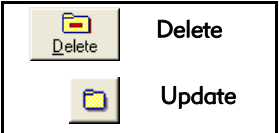
- only allow single-class cases in a country
- allow that rule to be overridden if the application is lodge under the Madrid Protocol.

Allowing only single-class applications in a country and a national phase override:

To allow only single-class cases that can be override at the national phase:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Attributes tab.

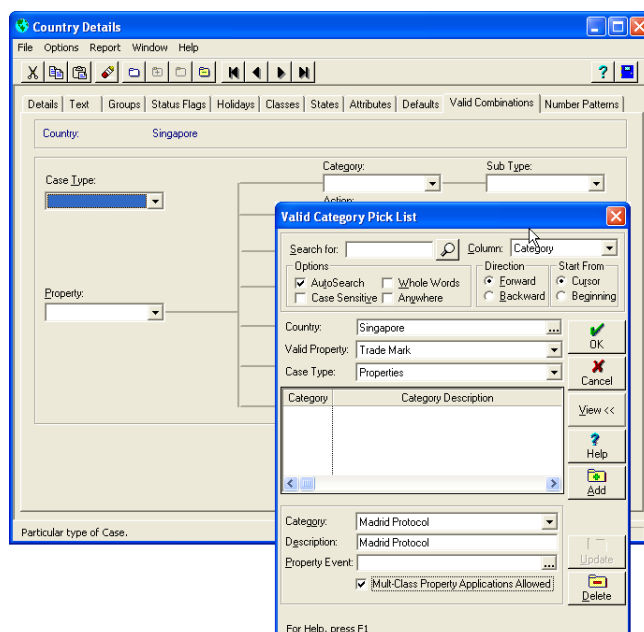
- 3 Is the Multi-Class Property Applications Allowed value listed against the Country attribute?

If...	Do this...
yes	<ul style="list-style-type: none"> click the attribute click [Delete] click [Update] on the toolbar. 
no	continue to the next step.

- 4 Click the Valid Combinations tab.
 5 Right-click in the Category field to open the Valid Category Pick List.
 6 Complete the following fields on the Valid Category Pick List:

Field	Particulars
Country	Select the country from the list.
Valid Property	Select the property that can be overridden from the drop-down list.
Case Type	Select the type of case that can be overridden from the drop-down list.

- 7 Click [Maintain] and then:
- Select the Category from the drop-down list.
 - Tick the Multi-Class Property applications Allowed checkbox.
 - Click [Add].
- Note:** If the case type is not listed, see “Adding a Case Type” below for information on how to add it to the list.
- 8 If there are more categories to add, go back to step 6, otherwise click [OK] to close the pick list.
- 9 Click [Update] on the toolbar to save the changes.



Adding a Case Type

To add a missing case type to the Valid Category Pick List:

- 1 On Valid Category Pick List window, click [Maintain] and then right-click in the Category field to open the Case Category Pick List.

- 2 On the Case Category Pick List, window, click [Maintain], then [New] and then complete the following fields:

Field	Particulars
Category	Type a category code.
Description	Type a brief description of the category.
Convention Literal	Type the literal name of the convention or protocol being added.

- 3 Click [Save] when finished.

Setting Up Billing and Address Defaults

Defaults can be set for billing arrangements for clients in a particular country as well as how to automatically populate the City and Postcode fields.

The screenshot shows a software window titled "Country Details" with a menu bar (File, Options, Report, Window, Help) and a toolbar. Below the toolbar are several tabs: Details, Text, Groups, Status Flags, Holidays, Classes, States, Attributes, Defaults, Valid Combinations, and Number Patterns. The "Country" field is set to "United States of America". The "Defaults" tab is active, showing two main sections: "Billing" and "Address Entry Options".

Billing Section:

- Currency: U.S. Dollar (dropdown menu)
- Tax Code: Exempt (dropdown menu)
- ☐ Tax No. Mandatory for Tax Exempt Clients

Address Entry Options Section:

- Populate city from postcode: (dropdown menu)
- ☐ Populate postcode from city

At the bottom of the window, there is a status bar with the text "International Classes Table" and a "NUM" button.

To set up billing and address defaults:

- 1 From the Details tab, locate the country in the list. (See "Locating a Country's Details" on page 5.)
- 2 Click the Defaults tab.

- 3 Complete the following fields on the Defaults tab:

Field	Particulars
Billing - Currency	Select the currency for billing purposes from the drop-down list. Notes: It does not have to be the national currency. For example, you could choose to bill in USD for cases originating in Vietnam. If this field is left blank, the currency must entered manually when new names are set up.
Billing - Tax Code	Select the default tax code from the drop-down list.
Billing - Tax No. Mandatory for Exempt Clients	Check this box to make the Tax Number field mandatory when setting up names. Note: If this box is selected, new clients cannot be added via the Correspondence Names Maintenance window in Cases because there is no Tax Number field on this window. Therefore, new clients can only be added via Names so that the tax number is recorded.
Populate City from Postcode	Select how to populate the City field when creating new names. If Full postcode is selected, then the City field will not be populated until a full postcode is entered. If Part of postcode is selected, the a pop-up list will display as soon as there is any match. If left blank, the City must be entered manually.
Populate postcode from city	Tick this box to have the postcode automatically entered from the City field.

- 4 Click [Update] on the toolbar to save the changes.

Setting up Selections for New Case and Property Types

You can set up pick lists to create rules allowing only certain combinations of case type, property and category for new cases in a particular country. This is done by maintaining the available selections in the pick lists.

The screenshot shows the 'Country Details' window for 'Sri Lanka'. The 'Valid Combinations' tab is active. The window contains the following fields and controls:

- Country:** Sri Lanka
- Case Type:** A dropdown menu.
- Category:** A dropdown menu.
- Sub Type:** A dropdown menu.
- Action:** A dropdown menu.
- Checklist:** A dropdown menu.
- Case Relationships:** A dropdown menu.
- Status:** A dropdown menu.
- Basis:** A dropdown menu.
- Date of Law:** A dropdown menu.
- Property:** A dropdown menu.
- Copy Entries From Country:** A checkbox labeled 'Copy'.

At the bottom of the window, there is a 'Country table.' label and a 'NUM' button.

For example, when your users are creating new cases, if they select patent as the property type, the category list might have five items. However, if they were to select trademark as the property type, the category list might only contain two items for them to select.

The following pictures from the New Case window in the Cases program, show how the Category selections differ according to the Property Type selected.

New Case - Properties

Case Reference Creation: ☐ User Entry IR ☒ Generate IR

Case Office: City Office

Case Reference:

Belongs to Family:

Instruction Received: 13-May-2008

Country: Australia

Property Type: Patent

Case Category:

Sub Type: Divisional, Patent of Addition, Provisional, Standard, Via PCT National Phase

Basis:

Title:

Available Case Category selections for patents

New Case - Properties

Case Reference Creation: ☐ User Entry IR ☒ Generate IR

Case Office: City Office

Case Reference:

Belongs to Family:

Instruction Received: 13-May-2008

Country: Australia

Property Type: Trade Mark

Case Category:

Sub Type: Divisional, Normal

Basis:

Title:

Available Case Category selections for trademarks

Notes of the fields:

Field	Particulars
Case Type	Lets you restrict the valid combinations for the selected case type. You can leave this field blank; but if you make a selection, you must also select a Property to be able to select from the other fields.
Property	Lets you select the property for which valid combinations need to be selected.
Category and Subtype	Lists the case categories (e.g. Normal or Divisional etc.) and the Subtype (e.g. Normal, Certification Mark, Collective Mark or Defensive Mark) that can be included in the valid combination for the selected country.
Action	Lists the actions (e.g. Lodgement/Application, Formalities Objections, Search Requests, Requesting Examination, and Examination/Prosecution) that can be included in the valid combination for the selected country.
Checklist	Lists the items (set up in Control) that can be included in the valid combinations for the selected country.
Case Relationships	Lists the default case relationship (e.g. Divisional Of, Related Case, and Convention Claim From) that can be included in the valid combination for the selected country.

Field	Particulars
Status	Lists the status (e.g. Renewed, Not Yet Filed, and Withdrawn By Client etc.) that can be included in the valid combination for the selected country.
Basis	Lists the basis on which applications relevant to the case are lodged such as Convention (based on the Paris Convention), or Non-convention (does not follow any standard convention), that can be included in the valid combination for the selected country.
Date Of Law	Lists the dates on which laws changed in the country

Maintaining Valid Combination Picklists

To set up valid combinations of for case types and properties:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the Valid Combinations tab.
- 3 On the Valid Combinations tab:
 - Select either a Case Type and / or Property from the drop down lists.
 - Right-click in one of the other fields to open its pick list.
- 4 On the pick list window:
 - Complete the Country, Property and Case Type fields.
Note: The default values should reflect what you selected in Step 3.
 - Click Maintain to expand the window.
- 5 What do you want to do?

To...	Do this...
delete a selection	<ul style="list-style-type: none"> • click the item in the list • click [Delete] • click [OK] to save the change.
add a new item	<ul style="list-style-type: none"> • complete the fields in the lower part of the window as required • click [Add] • click [OK] to save the change.

- 6 If there are more pick lists to maintain, go back to step 3, otherwise the procedure ends.

Copying Valid Combinations from Another Country

You can copy the default valid combination picklists of an existing country while creating a new country or while updating another existing country.

To copy the default valid combination picklists:

- 1 On the Valid Combinations tab, tick the Copy checkbox and select the name of the country from the adjacent pick list.
- 2 From the Entries To Copy group box, select the values of the criteria to copy and then click [OK].

Setting Up Official Number Patterns

Use number patterns to create rules about official numbers entered in Cases, and if the numbers entered does not conform to the rule, then the number entered is not accepted. For example, a particular country only issues registration numbers consisting of digits only. If a user attempts to enter a registration number that contains an alphabetical character, then the Cases program will not accept it.

Property Type	Number Type	Valid From	Warning	Alternate Validation	Number Pattern	Valid
Patent	Acceptance No.	01/01/2000	<input checked="" type="checkbox"/>		~200(0-9)\d{5}\$	Valid

Property Type: Patent
 Number Type: Acceptance No.
 Valid From: 01-Jan-2000
☒ Display Warning Only
 Additional Validation:

Pattern: ~200(0-9)\d{5}\$
 Error Message: Valid numbers start from 200


You can define number pattern according to property type (e.g. trademarks, patents etc.) and number type (e.g. registration, acceptance numbers etc.). Number patterns are checked against a VB Script Regular Expression. See “VB Script Regular Expression Syntax and Examples” on page 35 for the full syntax.

You also have the option of having a second level of validation via a stored procedure. Contact your CPA Software Solutions Consultant for assistance with creating custom stored procedures to perform additional validation.

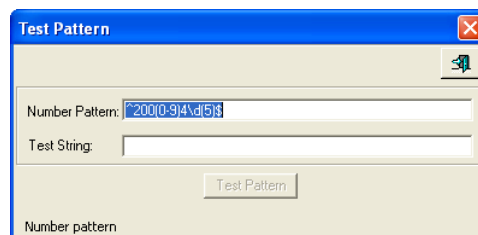
Adding an official number patterns

To add an official number pattern:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the number Patterns tab.
- 3 On the Number Patterns tab:
 - Select a Property Type from the drop-down list.
 - Select a Number type from the drop-down list.
 - Select the date from the new number pattern applies from the Valid From field.
 - Tick the Display Warning Only checkbox to have the Cases program issue a warning only if the number does not conform to the rule.
 - If the number is to be validated against a store procedure, the selected it from the Additional Validation field.
 - Type the number pattern to test for in the Pattern field.
 - To test that your number pattern works as intended, click [Test] and type the type the number to test in the Test String field.
 - Type the message that users will receive if the number does not conform to the rule in the Error Message field.
- 4 Click [Add] when finished.
The newly created pattern is displayed in the list.
- 5 Click [Update] on the toolbar.

 If you tick the Display Warning Only checkbox, numbers that do not conform to the rule will be accepted after the warning.

If you do not want the Cases program to accept non-conforming numbers, then ensure that this box is unchecked.



Deleting a number pattern

To delete a number pattern:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the number Patterns tab.
- 3 On the Number Patterns tab, click the pattern to be deleted and click [Delete].
The pattern is removed from the list.
- 4 Click [Update] on the toolbar.

Modifying a pattern

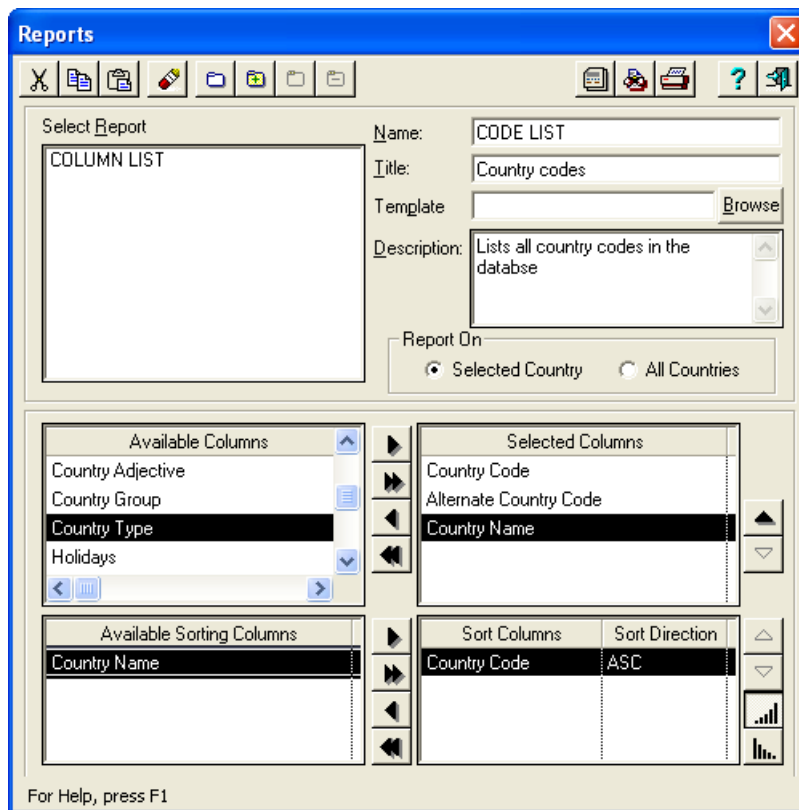
To modify a pattern:

- 1 From the Details tab, locate the country in the list. (See “Locating a Country’s Details” on page 5.)
- 2 Click the number Patterns tab.

- 3 On the Number Patterns tab, click the pattern to modify.
The pattern is displayed in the fields under the list.
- 4 Modify the fields as required and then click [Update] when finished.
The pattern is removed from the list.
- 5 Click [Update] on the toolbar.

Country Reports

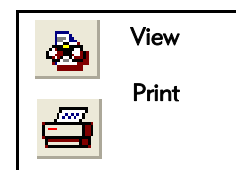
With the Country Report Writer you can produce reports on the set up of the various countries. For example, you could produce a list of all the working days for the countries in the system.



Running an existing country report

To run a country report:

- 1 From the Report menu, select Country Report Writer.
- 2 On the Reports window, click the report to run in the Select Report field then click either [View] or [Print].



Creating a new country report

To create a new report:

- 1 From the Report menu, select Country Report Writer.
- 2 On the Reports window:
 - Click [Clear All] on the toolbar
 - Complete the fields as required
 - Select columns for the report from the Available Columns list.
 - Select columns to sort on from the Available Sorting Columns list.
- 3 Click [Update] on the toolbar to save the report.

Appendix

VB Script Regular Expression Syntax and Examples

Syntax Table

Following is a list of the available characters in the Regular Expressions data validation functionality provided in Microsoft VBScript.

Character	Description
\	Marks the next character as either a: special character, a literal, a back reference, or an octal escape. Examples: 'd' matches the character "d" \d matches a digit character \\ matches "\" \" matches "("
^	Matches the position at the beginning of the input string.
\$	Matches the position at the end of the input string.
*	Matches the preceding sub expression zero or more times. Examples zo* matches "z" "zoo". * is equivalent to {0,}
+	Matches the preceding sub expression one or more times. Examples 'zo+' matches "zo" "zoo", but not "z". + is equivalent to {1,}
?	Matches the preceding sub expression zero or one time. Examples "do(es)?" matches the "do" in "do" "does". ? is equivalent to {0,1}
{n}	n is a nonnegative integer. Matches exactly n times. Example 'o{2}' does not match the 'o' in "Bob," but matches the two o's in "food"
{n,}	n is a nonnegative integer. Matches at least n times. Examples 'o{2,}' does not match the "o" in "Bob" and matches all the o's in "foooooo" 'o{1,}' is equivalent to 'o+'. 'o{0,}' is equivalent to 'o*'

Character	Description
<code>{n,m}</code>	<p>m and n are nonnegative integers, where $n \leq m$. Matches at least n and at most m times.</p> <p>Example <code>"o{1,3}"</code> matches the first three o's in "foooooood" <code>'o{0,1}'</code> is equivalent to <code>'o?'</code></p> <p>Note You cannot put a space between the comma and the numbers.</p>
<code>?</code>	<p>When this character immediately follows any of the other quantifiers (<code>*</code>, <code>+</code>, <code>?</code>, <code>{n}</code>, <code>{n,}</code>, <code>{n,m}</code>), the matching pattern is non-greedy. A non-greedy pattern matches as little of the searched string as possible, whereas the default greedy pattern matches as much of the searched string as possible.</p> <p>Example In the string "oooo", <code>'o+?'</code> matches a single "o", while <code>'o+'</code> matches all 'o's</p>
<code>.</code>	<p>Matches any single character except <code>"\n"</code>.</p> <p>Tip To match any character including the <code>"\n"</code>, use a pattern such as <code>'[\n]'</code>.</p>
<code>(pattern)</code>	<p>Matches pattern and captures the match.</p> <p>Tip To match parentheses characters (<code>)</code>, use <code>'\('</code> or <code>'\)'</code>.</p>
<code>(?:pattern)</code>	<p>Matches pattern but does not capture the match, that is, it is a non-capturing match that is not stored for possible later use. This is useful for combining parts of a pattern with the "or" character (<code> </code>).</p> <p>Example <code>'industr(?:y ies)'</code> is a more economical expression than <code>'industry industries'</code></p>
<code>(?=pattern)</code>	<p>Positive look ahead matches the search string at any point where a string matching pattern begins. This is a non-capturing match, that is, the match is not captured for possible later use. Lookaheads do not consume characters, that is, after a match occurs, the search for the next match begins immediately following the last match, not after the characters that comprised the lookahead.</p> <p>Example <code>Windows (?:=95 98 NT 2000)'</code> matches "Windows" in "Windows 2000" but not "Windows" in "Windows 3.1"</p>
<code>(?!pattern)</code>	<p>Negative lookahead matches the search string at any point where a string not matching pattern begins. This is a non-capturing match, that is, the match is not captured for possible later use. Lookaheads do not consume characters, that is, after a match occurs, the search for the next match begins immediately following the last match, not after the characters that comprised the lookahead.</p> <p>Example <code>'Windows (?!95 98 NT 2000)'</code> matches "Windows" in "Windows 3.1" but does not match "Windows" in "Windows 2000"</p>

Character	Description
<code>x y</code>	Matches either x or y. Examples 'z food' matches "z" or "food" '(z f)ood' matches "zood" or "food"
<code>[xyz]</code>	A character set. Matches any one of the enclosed characters. Example '[abc]' matches the 'a' in "plain"
<code>[^xyz]</code>	A negative character set. Matches any character not enclosed. Example '[^abc]' matches the 'p' in "plain"
<code>[a-z]</code>	A range of characters. Matches any character in the specified range. Example '[a-z]' matches any lowercase alphabetic character in the range 'a' through 'z'
<code>[^a-z]</code>	A negative range characters. Matches any character not in the specified range. Example '[^a-z]' matches any character not in the range 'a' through 'z'
<code>\b</code>	Matches a word boundary, that is, the position between a word and a space. Example 'er\b' matches the 'er' in "never" but not the 'er' in "verb"
<code>\B</code>	Matches a nonword boundary. Example 'er\B' matches the 'er' in "verb" but not the 'er' in "never"
<code>\cx</code>	Matches the control character indicated by x. The value of x must be in the range of A-Z or a-z. If not, c is assumed to be a literal 'c' character. Example '\cM' matches a Control-M or carriage return character.
<code>\d</code>	Matches a digit character. Equivalent to <code>[0-9]</code> .
<code>\D</code>	Matches a nondigit character. Equivalent to <code>[^0-9]</code> .

Examples of Number Pattern Validation

The following table list examples of regular expressions used for testing number patterns.

Number format required	Sample expression
4 digits	<code>^[0-9]{4}\$</code>
any number of digits	<code>^[0-9]{8}([0-9])*\$</code>
an upper case letter followed by 7 digit	<code>^[A-Z][0-9]{7}\$</code>
5 digits followed by a lower case 'a', 'b' or 'c'.	<code>^[0-9]{7}[a-c]\$</code>
8 digits, followed by optional decimals	<code>^[0-9]{8}([0-9])*\$</code> (This is the European Patent Office format.)